

TRANSFER IN / ROLLOVER IN FORM

- The contract Purchaser should complete this form to make a transfer/rollover to an existing GET account from any of the following investments: (1) another GET Account, (2) another 529 Qualified Tuition Program, (3) a Coverdell Education Savings Account (formerly Education IRA), or (4) a qualified US Savings Bond.
- Complete all sections of this form and sign it or processing will be delayed.
- Please read the important information on page 3.

1. Purchaser Information

Purchaser name (First, Middle initial, Last)

Social Security (or Taxpayer ID) number

Mailing Address

City, State, Zip

Email address

Home phone

Work phone

Have you opened a GET account to accept the rollover?

☐ Yes. GET Account # _____

☐ No. (Attach a completed GET enrollment form. New accounts may only be opened during an enrollment period.)

2. Designated Beneficiary Information

Student Beneficiary Name (First, Middle initial, Last)

Social Security (or Taxpayer ID) number

Mailing Address

City, State, Zip

Email address

Home phone

Work phone

Are you changing the beneficiary?

☐ Yes. What is the relationship to the original beneficiary? _____

☐ No.

3. Type of Rollover - (Please select one)

- ☐ From the redemption of a Coverdell Education Savings Account (formerly Education IRA)
- ☐ From the redemption of qualified US Savings Bond
- ☐ From GET Account Number _____ for Student _____
 Number of units to transfer / rollover _____ or ☐ transfer all units and close account
- ☐ From another 529 Qualified Tuition Program (QTP) - Provide the information below:

Program Name _____

Account Number for Program listed above _____

Beneficiary Name (First, Middle initial, Last) _____

Beneficiary Social Security (or Taxpayer ID) Number _____

- ☐ Check here if you would like GET to initiate your rollover from another 529 QTP to fund this account and provide the following information:
- ☐ Full account transfer/rollover
- ☐ Partial account transfer/rollover \$ _____ or % _____

4. Payment Information – (Please select one)

- ☐ Enclosed is a check in the amount of \$ _____
- ☐ No check enclosed. (New account will be funded through a rollover/transfer from another GET account.)
- ☐ No check enclosed. (QTP will mail payment direct to GET.)

5. Purchaser's Signature – Required

I certify that I am the purchaser of this GET account, that the information provided on this form is in all respects true, complete and correct, that I am submitting this form to make the Transfer or Rollover indicated above and that such Transfer or Rollover meets the requirements listed above for this type of Transfer or Rollover and that I fully understand the consequences of the Transfer or Rollover.

Purchaser's Signature _____

Date _____

IMPORTANT INFORMATION ABOUT ROLLOVERS/TRANSFERS

General Information

- If the assets will be used to establish a new GET account, you must also complete an enrollment form during an open enrollment period (between September 15 and March 31).
- If the transfer or rollover is to an existing GET account and you need to designate a new beneficiary to make the transfer or rollover valid, you should submit a completed Beneficiary Change Form together with this form.
- A “member of family” means parents, brothers, sisters, stepparents, stepbrothers, stepsisters, children, stepchildren, aunts, uncles, first cousins and other eligible blood or legal relatives per IRS Code Section 529. Please call GET if you have questions.
- Please consult a qualified tax advisor to determine if the transfer/rollover qualifies as a tax-free rollover. The State of Washington does not offer tax advice.

Specific Rollover/Transfer instructions:

Rollover/transfers from another GET Account

In order to be free from federal income taxes and penalties, the beneficiary of the account to which the transfer or rollover is made must be (i) the same as the beneficiary of the account from which the withdrawal is made (and it has been at least 12 months since the last such rollover for that beneficiary), or (ii) a member of the family of the beneficiary of the account from which the withdrawal is made.

Rollover/transfer from another 529 Qualified Tuition Program

- If you are transferring or rolling over from another qualified tuition program, to be free from federal income taxes and penalties, the transfer or rollover must be made within 60 days of the withdrawal from that other program. In addition, the beneficiary of the account to which the transfer or rollover is made must be a member of the family of the beneficiary of the account in the other program. However, a transfer or rollover can be made without changing the beneficiary provided no transfer or rollover from a qualified tuition programs has occurred for that beneficiary within 12 months of the date of the transfer or rollover contribution being made with this form.
- You must provide a statement issued by the program from which the transfer or rollover is being made that shows the earnings portion of the distribution. If this documentation is not provided, we are required to treat the entire amount as earnings.
- The other qualified tuition program may require you to complete additional forms or may assess fees. Check with the other program for details.

Rollover/transfer from the redemption of a Coverdell Education Savings Account

You must provide an account statement issued by the financial institution that acted as trustee custodian of the Coverdell Education Savings Account that shows the contributions portion (basis) and earnings portion in the account. If this documentation is not provided, we are required to treat the entire amount as earnings.

Rollover/transfer from the redemption of qualified US Savings Bond

You must provide an account statement or Form 1099-INT issued by the financial institution that redeemed the bond that shows the interest (earning) from the redemption of the bond. If this documentation is not provided, we are required to treat the entire amount as earnings.

How to Submit this Form

Submit this form along with your rollover contribution directly to GET. Do NOT submit this form to the program or financial institution from which the funds are being withdrawn. If the financial institution from which the funds are being withdrawn has not yet completed the rollover distribution and appropriate documentation, please contact them directly and ask them to do so (unless you have requested above that we initiate your rollover, in which case we will contact the other plan).